

THE STATE BAR OF CALIFORNIA
Trusts and Estates Section
Presents

The Thirty-First Annual Fall Program



November 2, 2007

Hotel Nikko

222 Mason Street

San Francisco, CA 94102

8:15 am to 5:15 pm.

**Online registration now available at
www.calbar.ca.gov/trusts**

8.0 CLE Units

The State Bar of California and the Trusts and Estates Section certify that this activity has been approved for MCLE credit by the State Bar of California in the amount of 8 hours.

THE THIRTY-FIRST ANNUAL FALL PROGRAM

This one day comprehensive program will include the following panels:

- Annual Probate, Trust, Guardianship, Conservatorship Recent Developments
- Crisis in Conservatorships: Highlights of Recent Legislative and Regulatory Changes
- Fiduciary Accountings: Put'em Together, Pick'em Apart
- Long Term Care Planning Strategies Under New Federal and State Law and Regulations



THE THIRTY-FIRST ANNUAL FALL PROGRAM

Presented by
The Trusts and Estates Section of the State Bar of California

November 2, 2007 • San Francisco

Hotel Nikko • 222 Mason Street, San Francisco, CA 94102

8:15 a.m. to 5:15 p.m. • Registration begins at 7:45 a.m.

REGISTRATION INFORMATION PROGRAM MATERIALS

DEADLINE: Your form and check, payable to The State Bar of California, or credit card information must be received by October 29, 2007. **Please register early because space is limited.**

MAIL TO: Program Registrations, The State Bar of California, 180 Howard Street, San Francisco, CA 94105. Make checks payable to The State Bar of California.

FAX TO: Program Registrations at (415) 538-2368. Credit card information is mandatory.

REGISTER ONLINE Online registration can be accessed at www.calbar.ca.gov/trusts. Deadline for registration is five (5) working days before the program.

ON-SITE REGISTRATIONS: On-site registration is on a space available basis only.

QUESTIONS: For registration information call (415) 538-2508. For program content call (415) 538-2206.

REFUNDS: All requests for refunds must be in writing and received by October 29, 2007.

SPECIAL ASSISTANCE: Please call (415) 538-2206 for special assistance or (415) 538-2231 TDD for speech and hearing impaired.

PROGRAM AGENDA

**8:15 to 10:15 Annual Probate, Trust, Guardianship, Conservatorship
Recent Developments**

James R. Birnberg, Esq.,

Mark Gillick

Kim T. Schoknecht

This panel will present its annual presentation of California & statutory changes, as well as recent federal estate and gift tax developments.

**10:30 to 11:30 Crisis in Conservatorships: Highlights of Recent Legislative
and Regulatory Changes.**

Peter S. Stern

Edward J. Corey, Jr.

This panel will present highlights of recent legislative and regulatory changes.

**11:30 to 1:00 LUNCH PRESENTATION featuring Timothy Tosta,
Luce Forward, Hamilton & Scripps LLP
"Death's 5 Lessons for the Living"**

1:00 to 3:00 Fiduciary Accountings: Put'em Together, Pick'em Apart

Margaret M. Hand

Blake Rummel

Presenters will demystify the preparation of fiduciary accountings while offering tips and discuss the new rules for conservatorship accountings.

**3:15 to 5:15 Long Term Care Planning Strategies Under New Federal
and State Law and Regulations**

Peter S. Stern

Mr. Stern will provide an overview of the Medi-Cal program after the 2005 Deficit Reduction Act, with suggested planning strategies for single and married persons.

REGISTRATION FORM

THE THIRTY-FIRST ANNUAL FALL PROGRAM

PRESENTED BY

THE TRUSTS & ESTATES SECTION OF THE STATE BAR OF CALIFORNIA

Note: One Registrant per form. Photocopies may be used.

State Bar Number _____

Name _____

Firm _____

Firm Address _____

City, State _____ Zip Code _____

Phone _____

Fax _____

E-mail _____

* Required for email confirmation

Your Name and Address may be disclosed.

☐ Check here if you do not want your information released.

REGISTRATION FEES (Check the appropriate box)

☐ \$275 **Trusts and Estates** Section Member

☐ \$345 Non-Section Member
Includes enrollment in the Trusts and Estates Section for 2008.

CREDIT CARD INFORMATION

I/We authorize The State Bar of California to charge my/our program registration to my/our VISA/MasterCard account. (No other credit card will be accepted.)

Account Number _____ Exp. Date _____

*VISA or MasterCard Only

Card Holder's Name _____

Cardholder's Signature _____

DEADLINE In order to Pre-register, your form and check, payable to the **State Bar of California**, or credit card information, must be received by October 26, 2007.

REGISTER ONLINE www.calbar.ca.gov/trusts

MAIL TO Program Registrations, State Bar of California, 180 Howard Street, San Francisco, CA 94105.

FAX TO Program Registrations at (415) 538-2368. In order to fax your registration, credit card information is **MANDATORY**. (Photocopies of checks will not be accepted).

CANCELLATION/REFUND POLICY All requests for refunds must be received in writing no later than October 29, 2007. Refunds will not be made for requests received after October 29, 2007.